Digital Marketing Institute

DIGITAL MARKETING STRATEGY

Study Notes

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Digital Marketing Strategy

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LESSON 1: DIGITAL STRATEGY FUNDAMENTALS

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STRATEGY FUNDAMENTALS

Concepts

'Strategy' is a word that we tend to use casually in our day-to-day business, but it is often misinterpreted. Therefore, it is important that we start off with an accurate understanding of what we mean when we talk about 'strategy'.

Digital strategies govern how digital is used to achieve commercial goals. A key foundation of digital strategy, that you will learn, is that it is primarily about **understanding your audience**, their behaviors and how you might craft new behavior that involves your brand, product, or services online. Strategy can regularly be mistaken for tactics. Short-term, generally more imminent, specific goals fit under the 'tactics' moniker, whereas strategy is about your long-term digital objectives and operates across all of the digital channels your customer utilizes.

Digital strategies

In short, digital strategies are plans that operate across all digital channels used by your organization or client to target audiences with creative formats working together to drive towards a single objective or set of objectives. Digital can be how you are using content on any of your online channels. Digital can also be how you use paid advertising to reach people. Digital can be how your customer connects with your brand; for example, by buying online, clicking like on Facebook, or tweeting about your brand. True digital practitioners utilize all three to get results.

A digital strategy involves a mix of setting goals, executing tactics and attempting to achieve high level business results. It is also a blueprint for your use of digital. From the start, everyone should be aware of, and committed to, a clear purpose and clearly identified success outcomes. So from the very start, what we have to be aware of is that we have to be committed to a really clear purpose and really clearly identified success outcomes. Because if you don't know why you're doing it and what the end goal needs to be then actually, what are you chasing as a result of using digital?

Core components

Before we really dive deeper into strategy, you first need to understand the core elements of digital strategy development, and there's five of them:

- Objectives
- Channel strategy
- Content strategy
- Media strategy
- Tactics

Objectives is about setting the goals and outcomes you are trying to achieve with your plan overall and from the individual elements that make up the plan.

Objectives usually fall into three main categories:

- Awareness
- Consideration
- Conversion and Retention

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These are the types of behaviors that can be most effectively influenced by digital channels.

Objectives

Awareness

Firstly, we need to identify the awareness levels of our product or brand. We can do this by doing some keyword research using our brand name or product name in tools like the Google Keyword Planner or Google Trends as well as our own knowledge of the market. If levels are low, we will have to make people aware of the existence and benefits of the product to them in order to drive sales or conversions down the line. Banners and outbound display and video on websites and social media are good approaches to drive awareness.

Consideration

If there is some awareness of our product but the market is cluttered or our product needs differentiation, we can use reach and frequency of messaging to drive recall of the USPs (unique selling propositions) or ESPs (emotional selling propositions) of our product to encourage consideration in the decision-making process of our consumers. Again, outbound display and social, as well as wider organic and paid search, can help drive consideration.

Conversion and retention

Ultimately, we will want to drive sales or conversions for our brand or product. These can be online or offline and will build on the awareness and consideration-based activities from the previous two stages to encourage people to take action and buy or convert. We can use search channels to drive this type of objective.

Finally, for retention – keeping previous customers engaged to encourage brand advocacy or repeat purchases – it is generally accepted that it is easier to drive sales from people who have already bought from you than to attract new customers so the retention objective should be considered high value.

Many multi-channel digital marketing campaigns will include elements of each objective to help customers along the sales journey. When setting objectives for your digital strategy, it's important to identify what the priority of the objectives is to focus resources, time, and budget on delivering the most important goal for the campaign. The choice and priority of the objectives will influence the channels you choose as part of your channel strategy.

Channel strategy

The channel strategy is understanding how you're going to use all of the different digital platforms that are available to you. It is about understanding what's possible with the channel, what formats you're going to use, and how you're going to use the features of that channel – how to be used most effectively and how you're going to target the audience engaging with it.

Channels are all the different digital platforms and locations that you might utilize. A channel strategy is an understanding of what is possible with channels but choosing to utilize either a specific channel or a feature of a channel because you know it is pertinent to your target audience.

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Content strategy

The content strategy is what you're going to put in those channels. So this strategy is informed by your overarching digital strategy.

The content can be:

- What you put on your site
- What you put on your social media
- How you tweet

That is all content and it's important to recognize that content doesn't just mean it's a video or an image. Content can be a top five things that you should do on an article on your site, or the content can also be the image on the header of your site. So it's just important to recognize that content encapsulates everything that's there, not just the things that you make.

Media strategy

The media strategy is often overlooked by smaller brands because it's a complex area to understand. Also, bigger brands often overlook the investment required within digital to be successful. So the media strategy is how you're utilizing your paid activity. How are you reaching people with ads? How are you making sure that you're reaching the right people using the targeting that's available to you and the formats that are available?

Tactics

Tactics are the individual executions that are a part of making up your strategy. It's important to recognize that quite often when somebody says, "Our strategy is to do this," they could be, in fact, talking about tactics.

So if I said to you that our strategy is to increase our brand awareness via Twitter, the **tactic** here is to tweet, whereas the **strategy** is to use Twitter to communicate more positively with your customers. That is an example of a clear strategy. There's a clear purpose, there's a long-term goal and that is how a digital strategy becomes more effective.

Understanding the outputs

In summary, the purpose of your digital marketing strategy is to use your available resources (channels, tools, and people) to deliver on an agreed objective while meeting expectations. Creating a strategy to deliver on your objective can be achieved by understanding available resources, setting timelines and budgets, looking at current and past activity, and assigning ownership of activities and KPIs to team members or stakeholders.

There is a three-pronged approach to understanding the outputs of a digital marketing strategy:

- First, you must establish the foundations of your strategy; what are you trying to achieve and how do you intend to achieve it?
- Second, you must have a strong familiarity with your current digital strategy, expectations, and the resources available to you. What is working and what isn't? Examine what is at your disposal and plan to adjust accordingly.

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- Third, you need to confirm the crucial requirements in running your strategy, the budget you have access to, and who exactly is in charge of the key decisions – ownership among team members must be established.

Philosophies of digital strategy

All advertising can be digital, but not all digital can be advertising. Digital represents the medium through which you are communicating, or the channels your audience are consuming information through. How this can be achieved is by understanding that there are a number of philosophies of digital strategy.

- Digital as content
- Digital as advertising
- Digital as participation
- Digital as a balance of all three

In this regard, simply engaging with your customer on social channels for customer service or emailing useful blog content to your customer with the sole purpose of driving goodwill and awareness falls outside the realm of advertising as you are not necessarily delivering a message about a brand or product to encourage them to take action but you are adding value to their lives by helping them out. As a result of good engagement, your brand equity and value will increase in the eyes of the audience which is of significant value to the brand and was part-achieved through non-advertising methods using digital engagement.

OVERARCHING STRATEGY

What is it?

Let's begin with a very high-level look at your strategy. This is your overarching strategy: the highest guide to your activity.

It is your strategy in one sentence, or a number of key phrases that quickly summarize your digital strategy. It involves a simple statement of what you will do and what your objectives are.

The overarching strategy should be a **simple and clear sentence** that anyone could understand, even if they are unaware of the full plan.

Your overarching strategy should be based on a **core insight**. You need to gather as much information on your audience, channels, and products, for example – basically everything that has been worked on to date. This will become the basis of your insight.

When doing your research, consider questions such as:

- What are the interesting learnings that you can use to develop your core insight?
- What content is your audience consuming?
- What format do they prefer?
- What are their interests?
- Can you identify a gap or a weakness for your brand, based on what you're seeing and reading in your research?

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When you have identified your core insight, you can begin to develop the overarching strategy for your digital campaign.

Digital marketing and digital media

We're going to make an important distinction now, regarding the difference between digital marketing and digital media. The difference between the two is clear.

Digital marketing

Digital marketing is the practice of utilizing digital tools for the purposes of marketing. Digital media is part of digital marketing. More specifically, it is the medium through which the marketing activity is delivered – for example, Google, Facebook, email, and display.

Digital marketing consists of all online activities, creative formats, and messaging that aims to engage with consumers online, using both free and paid channels, for the purpose of delivering or part delivering on a company's commercial objectives.

Digital media

Digital media refers to the channels used to distribute the messaging to the audience – for example, Google, Facebook, Twitter, and email. Marketers use media plans – which include a detailed guide to the formats, timings, and spends for a campaign – to manage these different activities.

DIGITAL RESOURCES

Core elements

Depending on the size of your organization and the budget available, the marketing team can be large or small. In smaller campaigns, digital marketers may be required to double-job and work across a number of channels. It is important to identify what resources are required early on. You can then plan how much is required, and more importantly, plan how to avoid over-investing. Digital is an exciting space, so it's easy for team members to get a little bit lost in it and dedicate too much time to something that is more 'fun' to work with.

Time

Digital can be time-consuming and labor-intensive if not planned correctly, and as a result, you might run the risk of underestimating how much time it's going to take and how many people you will need to complete the task. In some cases, you may need to upskill existing members of staff, or bring in someone who has a higher skill level, to begin to manage your team and the project.

Money

Money affects several areas. It can be a cause of frustration for marketers because, historically, the perception was that digital was relatively free, it was relatively cost-effective, and that it was an efficient use of budget. In reality, as digital has become more advanced, some of the practices that are carried out in digital are a lot more complex; digital therefore requires more time, more investment, and more tools to measure it effectively. Therefore, it is crucial to understand everything that you have available to you.

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People

People are the most underestimated resource. It is important to familiarize yourself with knowing when to bring in the right people so that they're spending time efficiently towards the development of the project more efficiently. Businesses often see early successes in digital, and don't address the increased requirement for people – or don't address the need quickly enough – which can rapidly turn success into failure.

When putting your digital plan together, assess your project requirements and match them to the skillset of your team. If you need outside help, consider an agency or freelancers to bridge the skills gap. That way you'll have the right people in place to deliver on your plan and objectives.

Resource maps

A resource map, providing a clear layout of all the resources you will require and identifying gaps in your current resources, should be used to help plan your project

Resource maps don't need to be 100% accurate, but they are the first step in outlining what resources you'll require. A resource map allows you to illustrate project requirements against current availability. Invariably, digital suffers from under-investment, and a resource map can be a good way to build the case for securing more resources.

In short, a resource map is a comparison between what you estimate you will need and what resources are actually available. Using this comparison, you can see where you may have gaps and decide whether they can be filled by more people, money, or time. Taking the time to map out the resources required can help you secure 'buy-in' from managers and budget holders and it will allow you to project manage the plan more effectively.

		Site	Social	Search	Content	App	Media	Total
Estimate Required	Hours	3	3	2	2	1	2	4
Available		1	1	0	0	0	2	1
Estimate Required	Ad Spend	$30,000.00	$20,000.00	$20,000.00	$-	$-	$-	$1,500.00
Available		$30,000.00	$10,000.00	$5,000.00	$3,000.00	$-	$-	$1,000.00
Estimate Required	Production							$70,000.00
Available								$30,000.00
Estimate Required	Training							$25,000.00
Available								$10,000.00

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BUDGETING

Key elements

The budget is a point of frustration for a lot of digital marketers. The problem with budgets is that you need to plan for how much money you're willing to invest over a given time.

Therefore, you have to create a budget plan. You need to come up with a plan of how you're going to implement the budget, how much each function is going to require, because if you have a meticulously planned budget, providing all the necessary detail, it's very difficult to say no.

Essentially, budgets comprise media costs, creative production, agency fees, and digital tools and technology for the purpose of delivering on a campaign or strategy. Additionally, staff costs, training and processes can be included as part of the overall budget though this isn't always the case.

Media costs

This will usually be the largest budget consideration of any digital marketing plan. In order to budget and forecast you can use historical performance or estimates from the channels or media platform. You should look at the overall goal of your strategy and prioritize the budgets towards the channels that deliver on your goals. If your goal is sales, you will put more budget into PPC than the other channels in your plan, as PPC is a conversion-driving channel. On the other hand, if your goal is interest or consideration you will put more budget into display or social media.

As every digital marketing strategy will be different, there is no one size fits all rule for budget allocation and you should try to balance channel and conversion costs from historical data against your overall goal to distribute the budget across your different channels. It's possible to move media budget from one channel to another if you are seeing good performance when the campaign is live.

Creative production

Production costs will be the second largest expense after media when budgeting for a digital marketing campaign. Depending on the type of media chosen, you will need to produce specific creative assets. These include videos, social media images, advertising banners, website image assets, email formats and other creative outputs to use on your media and website. These fees are for designer, account manager and video production time so it's important to remember that certain media choices require creative formats to run or you can't use them to their full potential. As a result, it essential to leave enough budget available after media costs to produce the creative assets to run on your media choices.

Agency fees

If you are using a third party to run and manage your campaign, including, booking and buying media, managing creative assets, reporting and optimization, you will need to pay for their time - this is usually costed on an hourly fee. It tends to be lower than media and production costs. While some agencies will charge their fee as a percentage of media spend, this method rewards spend not performance, irrespective of how good or bad the campaign performs. The agency gets paid simply for spending the media, there is also little insight into how many hours are invested in the campaign. As a result, it can be difficult to drive performance when agency fees are calculated as a percentage of media spend. Most agencies will charge an hourly fee which is a better model for driving performance.

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Digital tools

Sometimes there are digital tools required for the campaign, for example, ad serving tools which are used to upload, manage, and serve your image creative assets to your audience. These tools and additional analytics tools will have associated fees. If there are additional tools that are required for the campaign, it's important to understand the value and purpose of the tools before committing to a budget to pay for them. Therefore, it's essential to understand if they are a crucial part of the success of the campaign or a "nice-to-have" additional piece to enhance understanding.

Developing a budgeting plan

Your budget is directly dependent on what factors are influencing these areas.

- **People:** Questions which can arise include, "Do you need a larger team? Do you need specific skill sets within your team in order to achieve what you feel is the right way to approach it? Do you need to adopt a new process of piece of technology to improve your results?"
- **Technology:** Technology, particularly in larger teams, really helps to improve efficiency. How you achieve efficiencies is by examining existing and new tools to make sure that the teams are linking in with each other correctly, that they're sharing data and insight correctly and accurately. So, it's important to recognize at what point you need to invest in these should you find reasons to address possible inefficiencies.
- **Training:** Training must not be overlooked! You should be asking "how much training does your team require? How much do you need to upscale your team?" It's important to recognize this early because it's often something that falls by the wayside. If you find inadequacies, then you should try to remedy this as soon as possible.
- **Process:** What volume and detail are required in your ad buying strategy? If you have a high investment in media, in advertising, in paid ads, what you're going to find is that it's going to require more tools and more people to actually manage that advertising.

As you start to increase your efforts into your media buying, content partners or network partners or working with other sites that use display advertising, what you're going to find is that you're going to need more resources to actually manage this. Moreover, you will discover, not just the level of manpower and amount of resources required, but also how much time it will take to monitor and control your digital strategy.

BUDGET PLANNING

When you're planning your budget, the following considerations are key areas for you to evaluate:

- How many people are in your target audience?
- What are your objectives?
- How many people could you realistically make customers?
- How much money are you willing to invest in digital?
- Have you allocated budget to cover busy months or campaigns?
- Are you allocating enough ad spend?
- Are you under-investing and limiting your impact?

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Key considerations

Target audience

How many people, realistically, are within the target audience that you feel you can reach? We all want to be highly successful and make millions of dollars for the organizations that we work for, but realistically, how do we ascertain a successful measure of new customers? How many customers do you need to make in order to keep the lights on? How many customers do you need to make to be really successful?

What follows next is the important question: “How big is your budget?” If you think you will be given a small budget, focus on your target audience through a specific lens. For example, if you told me that your target audience was 25 to 35-year-olds, and then you told me that you had a small budget, the first question I would ask you if you think you will be more successful with a male or female audience. For multimarket, it's the equivalent to saying if you think that you're going to be the most effective with city dwellers, then only target the capital cities of specific markets to make sure that you're effective.

Setting

You need to understand that budget setting for channels and formats is linked to your objectives. You should allocate more budget to those channels that will efficiently and effectively deliver on your digital marketing objectives. It's possible to forecast channel performance by using historical performance as a benchmark for future campaigns. Using historical conversion rates, you can estimate how much traffic you need at that conversion rate to deliver a certain number of sales or leads. With paid media, you can estimate the cost of that traffic by using historical CPCs or CPMs to estimate costs.

Money

How much money do you realistically feel you can invest in digital? It is often the case that when you go through this process you will realize that you don't have enough money to invest in digital to do absolutely everything you want to do, and that is okay - nobody ever has enough money that they want to put in digital. I regularly have to bow to give money to other channels or other media because, strategically, it's the right thing to do.

Under-investing

Are you under-investing in digital and is there a gap that you need to now make up? This is a commonly occurring challenge for a lot of businesses who might be late to the game. Generally, they find that they haven't invested in digital and all of a sudden they need a new website, they need social channels, they need to create content. All of that can be quite daunting, so you need to find a way to make sure that you understand how you might be able to spread those costs out.

Ad spend allocation

This is important because a lot of brands early on don't invest in media, and similar to the under-investing example, it can become quite a shock when you realize that you actually have to pay-to-play for a lot of the media channels that you should be using. Some brands start out with social, and then ignore search or ignore display for a long time, and then they realize they're missing those

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elements in their media mix. So, it's important to anticipate ad spend allocation and if it will be enough.

Budget allocation

The final point is the budget allocation and prioritization. When you get to the end of this, if you feel you're under-investing, then you need to make a case for either more investment, or you need to make a case for a better use of your resources. The problem with under-investing is that you can find that you're not going to do enough to even try to make digital work. It will not be a success and you will find yourself facing challenges as to it not working, when actually the reality was, the business didn't invest correctly in the first place, thereby obfuscating the efficacy of your digital strategy campaign.

Building a budgeting plan

Next, we're going to talk about developing a budgeting plan. Budgeting plans allow you to plan out all investment month by month, over a specific period of time. Planning long term will secure investment. Without a plan, money will be moved around, resulting in digital being under-invested in, under-performing and ultimately being questioned.

Without a plan, what will happen is money that you had will all of a sudden get moved to another department or another requirement because there was no plan for it. So, just ensure that when you're planning over a number of months, that you address moments when you think that the investment will need to fluctuate. For example, in campaigns during seasonal periods, try to anticipate how your budget might need to increase or decrease. An example of this that is important is Christmas for retailers. Retailers tend to underestimate how much budget is going to be required during the Christmas period.

So, if you've spent time addressing your budget, you can ensure that the teams are also sticking to the plan, everybody's following the numbers that are on the sheet. Then begins the reflection stage where you should try to discern if you under-spent or over-spent in certain areas with a view to making adjustments in the following period.

What can happen is **over-investment** in the early periods, and then by the time you get to the end of it, you realize that you actually don't have the money to achieve something that you wanted to do. Building a plan that tries to anticipate these possible fluctuations, to give you the room to maneuver, can make all the difference to seeing good results from your digital strategy campaign.

So, if you know what your budget is for a year, you should plan for a year. If you know what your budget is for a half year, you should plan for a half year, and so on. Never plan beyond where the budget exceeds because all you're doing is guesswork then.

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	Jan	Feb	Mar	Apr	May	Jun	H1 Total
Team Costs							41000
Salaries	4000	4000	4000	6000	6000	6000	30000
Training			10000				10000
Recruitment			1000				1000
Media Spend							23500
Search	1500	1500	1500	1500	1500	4000	11500
Social	1000	1000	1000	1000	1000	3000	8000
Display	500	500	500	500	500	1500	4000
Agency Costs							22000
Agency One	2000	2000	2000	2000	2000	2000	12000
Agency Two			5000			5000	10000
Tools							8100
Sprout Social	150	150	150	150	150	150	900
Social Listening	1200	1200	1200	1200	1200	1200	7200
H1 Total Cost							94600

RETURN ON INVESTMENT

The role of ROI

Understand that ROI is the cost of your digital activities versus the return they generate, in terms of monetary investment. This is usually reported as a percentage and can measured by using this formula:

ROI = revenue - marketing spend x 100 / marketing spend

Determining ROI

ROI can be understood as the return on marketing investment. Success within your digital activities can, generally, be boiled down to two key outcomes:

- **Sales:** Someone buying a product through a digital channel, or as a result of digital activity, is an effective measure of how much sales are being generated versus how much it cost to actually deliver. In short, sales will have an explicit revenue value.
- **Leads:** Leads, in this context, can be defined as capturing valuable data from customers who express an interest in your product or service. This data is best captured through lead forms on landing pages on your site. The value of a lead can be understood by its conversion rate and average sale cost. If we divide the sale value by the number of leads needed to generate a sale, we get revenue per lead.

Determining value of lead

To determine the value of a lead for the purpose of ROI, we need to calculate what the revenue is per lead. If we divide the sale value by the number of leads needed to generate a sale, we get revenue per lead. Once we know the revenue per lead and the cost per lead we can determine ROI.

For example:

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- If leads have a 10% sale conversion rate by sales representatives, then that means it takes 10 leads to drive one sale.
- If a sale is worth $100 and it takes 10 leads to generate one sale, then we can say, on average, one lead is worth $10.
- In other words, $100 sale value / 10 leads required to generate a sale suggests a return of $10 revenue per lead.

Measuring success with ROI

ROI is one way of measuring the success of a campaign or strategy. Another approach is to look at other valuable actions, such as micro conversions. Micro conversions are the actions that a user takes that contribute to the purchase decision-making process. ROI can be a monetary value but might also apply a value to a specific action – for instance, site visits, enquiries, and video views.

To measure the value to non-conversion activity like social media or display, you can look at how much engagement is required to deliver a sale or lead. Social and display have an indirect effect on leads and sales. Therefore, we can look to see if our activity had impact on conversion rates for the conversion channels by seeing what conversion rates and volumes were like for conversion channels before the campaign, during the campaign, and after the campaign. By recording any changes in conversion rates from the normal level, we can start to see the value of our assisting channels. This way we can attribute any uplifts from the norm to our campaign.

When we're talking about top of funnel or non-conversion channels, we need to measure their impact in a different way than direct sales or leads. For example, video views can deliver higher awareness, positive conversations about your brand, and higher brand search volumes – all of which are valuable outcomes. Customer awareness of your brand can rise during or following a social media campaign, which could lead to an increase in brand PPC searches/sales. To see if awareness or non-conversion channels impact your sales, look for a change in brand PPC searches or PPC/SEO conversion rates in Google Analytics.

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NOTES

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LESSON 2: SETTING STRATEGY OBJECTIVES AND KPIS

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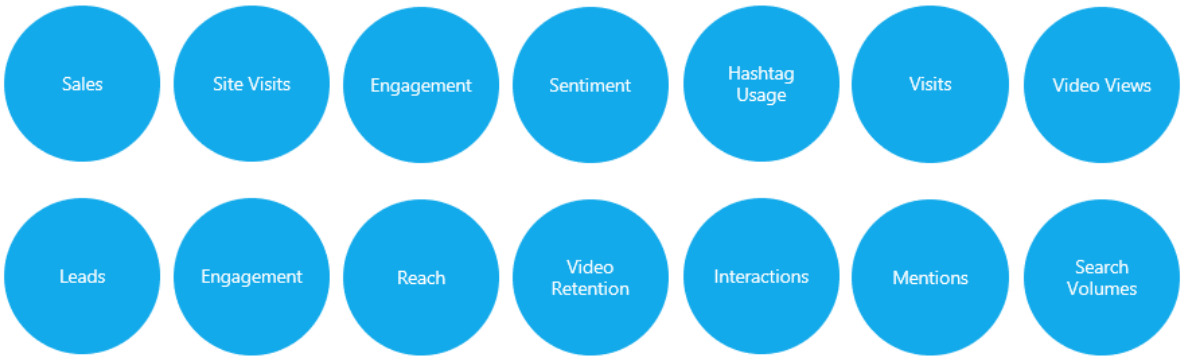
SETTING OBJECTIVES

Purpose of the objective phase

The objective phase sits at the heart of the process of creating a digital strategy. Setting clear objectives for your digital marketing activity should be the starting point to build an appropriate digital strategy.

Objective setting activities

These objectives should be business objectives that can be realized through digital marketing, for example, increase e-commerce sales, drive more leads, build audience engagement with your brand. The objective phase should be focused clearly on beginning with your key success outcome and then identifying your KPIs. Once you have achieved this, then you can begin designing the strategy that is measurable and clear.



The biggest challenge for digital is that there is so much that you can do. Being clear and concise is crucial. You have got to make use of all your resources in an efficient manner; know where your money is best spent and try to minimize budget waste.

Some key objectives throughout a digital marketing strategy are:

- **Conversion/sales:** That is commercial success.
- **Consideration:** That is evaluating if the product or brand meets your needs.
- **Awareness:** This is about audience reach
- **Retention:** This enables you to establish customer engagement.

Digital can help deliver on any of these goals and it's important to establish what is your priority to help choose channels and measure success.

Business performance is an important expectation because it is often misguided in solely looking at direct sales. Outside of just focusing on sales, it is important to understand success can also be measured in leads and engagement. It's important to know what metrics or KPIs are most suited to measuring the success of your overall strategy as well as its different channels that make up the strategy.

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For example:

- PPC and SEO, when used as conversion channels, can be measured in sales or leads delivered
- Email and Mobile Apps when used as customer retention channels can be measured in customer retention, repeat use, engagement, leads and sales
- Display and Social media when used as awareness channels can be measured in reach and engagement
- When you understand what the measurement and goal of a channel is, you can use diagnostic metrics to evaluate success even further. Some examples of metrics used to diagnose success include:
- CPA and CPL for conversion channels
- Sentiment and Awareness for customer engagement channels
- New versus returning users and increased sales or conversions for customer retention channels

SMART goals

Objectives are the resulting outcome of a number of KPIs combined to create an outcome that is used as a marker of success. Firstly, you should create a rough list of all the possible success outcomes that are relevant to your brand. Then, using the SMART goal system, you should stress-test your objectives.

As a quick reminder, SMART goals are:

- **Specific:** Is the goal clear and singular. Try to avoid multiple results and being vague, for example, “we want more site traffic and positive sentiment”.
- **Measurable:** How are you collecting and generating data from your activity?
- **Achievable:** Is the goal feasible given the circumstances and the resources available to you? Can you do it?
- **Realistic:** Is this a goal that is realistic for the business?
- **Timely:** Can you achieve results within your given time period?

SMART goals are important for your organization as they are the success outcomes on which your performance on digital channels will be measured.

KPIs

What are KPIs?

Key Performance Indicators (KPIs) are metrics that combine to deliver on wider Key Success Outcomes (KSOs). KPIs are used to measure the effectiveness of content, channels, and activity in delivering your goals. It is important to set meaningful and realistic KPIs by clearly understanding what metrics are available and best suited to measure channel performance.

For example, you can measure awareness channels like display and social with assisted conversions, reach, and frequency, while PPC and SEO are conversion channels and can be measured in:

- The number of leads or sales driven
- Cost-per-acquisition or lead
- CPA/CPL or conversion rates

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Choose the right metrics to measure the success of a channel by setting KPIs related to those metrics.

Reporting and measurement

Reporting and measurement are often mistaken as the same thing, and it is important to identify the difference from the outset.

- **Reporting** provides many metrics of performance. It's a benchmark of how certain activities are performing in a given time, and a given day, on a given month. It's seeing how a particular task or goal was achieved. Reporting is something for more junior team members to work on, to ensure work is operating correctly.
- **Measurement** is how senior members of the team identify specific measures and how they are impacting the business. It is a specific set of metrics that can be used to measure business performance over time.

Assigning responsibilities

You need to address the following questions:

- Who identifies the patterns of success?
- Who ultimately makes decisions for change?
- Who is responsible for performance?
- Who tracks performance?

Without accountability there is no guidance. Everybody in your team should understand:

- What they are responsible for
- What their KPIs are
- How they can be successful
- What their daily/weekly goals are

By explicitly setting KPIs and measuring performance against these KPIs, you can ensure you are on track to deliver your goal. If you are ahead or behind on your KPIs, you will be able to identify this before the campaign finishes and make any necessary changes while 'in-campaign' to over deliver or get back on track.

KPIs within specific business areas

KPIs are milestones to measure success and keep everyone accountable to measurable goals at all times.

Each department has specific strengths and areas of expertise. It therefore makes sense to make each department responsible for different KPIs and KSOs:

- **Marketing:** Responsible for sales, awareness, awards, and engagement
- **Product:** Responsible for sales, CTR, and conversions
- **Customer service:** Responsible for sentiment, response time, and response rate
- **PR:** Responsible for company image, reach, and sentiment

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Just as it is important to assign the right KPIs to your channels, you need to assign the most valuable KPIs to different teams and departments based on their core function and what they can realistically achieve. Remember, it can be demoralizing to set unobtainable KPIs or incorrect KPIs.

FORECASTING

Reviewing past campaigns

To understand how your strategy might deliver on its objectives, you can forecast results by looking to similar campaigns from the past as a benchmark of performance. When your strategy is complete you should go back and revise your forecasts to take into account what you have uncovered in your research, and to reflect your agreed media and channel plans.

Forecast results

By looking at audience engagement levels, channel conversion rates, traffic numbers, and costs, we begin to identify key channels and audiences to target. Moreover, using historical metrics like CPC, conversion rates, and CPA, it is possible to estimate what each channel could potentially deliver for the available budget if these metrics were to remain the same. It's not a perfect predictor of future outcomes, but it can help with KPI setting.

The forecast will then need to be analyzed against your research to understand if the channel and audience mix is correct for this campaign. When it comes to conversion channels for leads and ecommerce, forecasting is an iterative process that begins with traffic. We sell to people, so we need to drive people already on the site with our channels to buy. Traffic and users are our starting point.

- **Traffic:** You can estimate the traffic you could drive for your available budget by using historical CPCs or cost per user. Simply divide your available budget by your cost per user or cost per click to see how many users or clicks you can get.
- **Total conversions:** Once you have your estimated clicks or users, you can use historical conversion rates to estimate the number of conversions you might get for this traffic. All of these numbers will turn into KPIs; in other words, you need to have a specific cost per user or CPC to drive the traffic you need for your budget, so CPC or cost per user is the first KPI. Then you must deliver a specific conversion rate to drive the sales or leads from your traffic. Conversion rate is your second KPI.
- **CPA:** When you know how many conversions you can expect, you can then work out the forecasted CPA and evaluate against your ideal CPA. This can be set by the business, or from past campaigns.

It can be difficult to estimate engagement as it is so reliant on people engaging with your creative. However, we can work out some numbers by using historical data from engagement channels to help us estimate how much engagement we could expect for a budget. If we count all of the comments, likes, video views, or shares from a previous campaign, and divide the budget for that campaign by these engagement numbers, we can work out our cost per engagement – our cost per like, cost per share, or cost per view. We can then look at our current budget and divide it by our cost per engagement metrics to estimate how much engagement this new campaign might yield. If our campaign drives more engagement than the forecast, we could hypothesize that the creative for the new campaign was better than before. Likewise, if our new campaign performs worse than the forecast, we could infer that the creative was less engaging. This gives us insight into the effectiveness of our messaging, social media competitions, and creative pieces.

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Set KPIs

When you have an agreed forecast there will be a number of metrics that you need to keep an eye on to ensure you are on track. These metrics are your KPIs and they are evident in your forecast. The goal should be to achieve or exceed your forecast as this is the ideal outcome you expect based on your overall objective. As mentioned, in order to ensure you are on track, you can use your forecast to set the required CPC, CPM, conversion rate, or CPA as KPIs to deliver your plan. These KPIs are useful when optimizing in-campaign.

For example, if conversion rates are lower than expected you will need to deliver more traffic (and spend more budget) at a lower conversion rate to meet your targets. This will have a knock-on effect on the CPA, so it's important to stress test this against what is an acceptable CPA by business standards.

Likewise, if CPCs are lower but your conversion rate is on target, you can deliver more conversions than expected because you will be able to drive more traffic for the budget. Higher traffic levels at the expected conversion rate will drive more conversions than forecast, so it's important to see how KPIs work together to measure success.

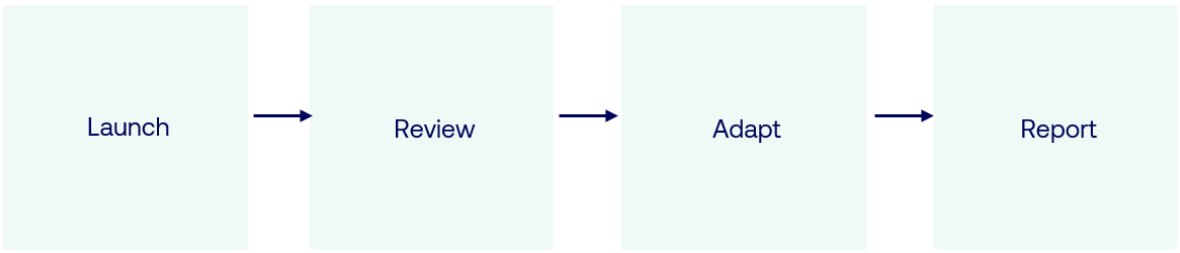
Role of forecasting

Remember, forecasting doesn't guarantee results – it simply illustrates a possible outcome based on past performance. It is also possible to forecast different scenarios to present alternative outcomes. Repeat the forecast with a 5% increase in CPCs or a 10% reduction in conversion rates, for example, to see what the outcome might look like. When reporting in-campaign, assess how your KPIs are performing against the different scenarios you have created.

REVIEWS

Importance of reviews

Reviews are an important part of the strategic process. Before you begin building the strategy, it's important that review timelines are set in stone with the teams. It is sometimes important to put reviews in calendars for the year, so everyone clearly knows during what period they are being measured against. It is also an important part of ensuring that teams are adhering to the guidelines and the strategy set. Everything should be guided by specific timelines, activity, and reviews.



1. We put in place a process for examining our strategy a number of weeks after **launch**.
2. Then we **review and we adapt**. We review what our changes have caused, we adapt.
3. And then we **report** on our findings. So, we should be addressing, within that report, what adaptions were made, what changes were put into place, and how they started to shift.

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But, it's really important to give your strategy room to breathe. Strategies should always be considered long-term, but during that time, through review and reflection, you can make them iterative and transformative.

Through consistent measurement, you can identify performance levels and make decisions on them. Underperforming content and tactics can be addressed, allowing you to improve content or scrap an activity that just isn't working.

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LESSON 3: DIGITAL STRATEGY RESEARCH

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RESEARCH ACTIVITIES

Key activities

The following activities conducted during the Research phase are intended to develop key insights that guide your strategic direction:

- **Research mapping:** Identifying all the points of data that will input to strategy
- **Channel analytics:** Utilizing your existing data on existing channels to make decisions
- **Audience research:** Finding out more about your target audience that you can use to reach them effectively
- **Keyword research:** Taking insights from how your customers utilize keywords in search engines
- **Social listening:** Observing how people talk about your brand, category, or industry on social media.

The purpose of research is to learn as much as possible *before* developing a strategy. We often enter into the strategic process with assumptions. When faced with a challenge, we often feel like we know the answer. Research is not necessarily to prove you are wrong, but can also confirm you are right and support your decisions.

The research phase plays a core role in learning as much about your target audience, your industry, and the environment as possible. This information is going to become the backbone of your strategy. It ensures that your strategy is built upon insight instead of just assumptions alone. You will start to learn more about people, you'll start to discover new things about the audience and the platforms that you have already, and that will start to inform what you're trying to do.

THE RESEARCH MAP

What is it?

For larger plans and more sophisticated strategies, marketers can use a research map. This is a plan that ensures all areas of research are being read correctly, beginning with the challenges you are facing. This plan allows you document and map your research to derive insights.

A research map is a plan that ensures all areas of research are being read correctly, and allows you to map this research to derive insights.

Think of it as a simple mind map. When creating one, plot the things you begin to learn about your audience, or insights regarding the challenge you face. We do this so we can look at all our information in one place to identify patterns and connections between our findings. You should place your audience and challenge at the center and begin to plot findings around the challenge.

THINKING CRITICALLY ABOUT RESEARCH

Knowing the difference

It is important to think critically about your research or the research you discover. Being able to differentiate between strong research and possible false reports can lead to a profound impact on the decisions you take.

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Some examples of types of research which should be examined closely include:

- Absence of sources
- Old information
- Small sample sizes
- Origin of the report

OWNED AND DESK RESEARCH

Owned research

Owned research is research that your business owns, has easy access to, and is directly related to your business. Owned research is valuable because it provides a clear insight into your own opportunity, and it gives the most accurate insights directly relating to your business and customers.

Examples of this include:

- **Website analytics:** This is your website traffic, engagement, and conversion metrics. This data can be used to forecast results and set acceptable benchmarks based on observed past performance.
- **Current customer research:** This is any research you have conducted on your customers, from surveys to conversations between customers and salespeople. It can also include large-scale market research.
- **Social channel insights:** This is a look into engagement, follower levels, audience interests, and demographics from your social channels to provide a snapshot of your audience characteristics.

Desk research resources

Desk research is quite simply the research you can access easily from your desk through a simple Google search. It involves finding free to access articles, studies, and research papers online. They help you discover demographics, insights, and trends. Desk research is also the most cost-effective research tool as it allows you to easily access information for free.

Try to use research that is carried out by large research bodies and then made available online. This type of research is an excellent source of multiple research studies you can use to uncover simple insights. In some cases, there are costs involved, so this is generally something that larger organizations access. Look to organizations like Google, Facebook, etc. They have research and insight groups that regularly release free information and insights.

The following are resources available online:

- **Premium:** WARC, ANA
- **Free:** Think with Google, Consumer Barometer

Using Google

Google is a highly effective desk research tool. It allows you to use the right keywords but also dictate the time you wish to look at them, to ensure the research is relevant. Typically, the best way

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to treat Google is to ask it questions about people. You can then find articles or sources with your answers.

What do you want to know about people? Take the time to use search engines to find out answers to your audience, industry, and channel questions – you'll be amazed what you can find.

DIGITAL AUDIT

Concepts

A digital audit is an assessment of all active media channels and to evaluate how effective they are in the current campaign. Audits are useful to conduct in advance of the planning stage of your strategy to build a foundation on historical performance and to understand the available channels to include in your plan.

When you're really going to start to dig into it, one of the first things that you're going to do is carry out what's called a digital audit. Is it good, is it bad, is it effective, and how many channels do we have, and what we're operating within them?

For this, we utilize a process of how you actually get the audit done. It's a step-by-step process that you just go through to make sure that you understand what's going on.

It's crucial for establishing exactly:

- What sites we have
- What pages are on the site
- What profiles we have on social media
- What accounts are in existence
- Who has been operating them

It is often the case that social has taken ownership when it was popular, and now it's being operated from outside of the marketing function, or it's being operated by another team, and it is helpful to understand the politics of it, but also how it's being utilized.

By going through this checklist, you're going to create a clear outline of everything that's pre-existing and a key outcome of the audit should be a full awareness of digital within your entire organization. It is important to know that this can be used to overcome internal politics. If one channel is being managed by another team, if you show them the depth of understanding that you're trying to establish for digital for the whole business it's not to say that you need to take it away from them, but you might actually be able to increase your control.

Structuring your audit

A digital audit is crucial for establishing exactly what sites, pages, profiles, and accounts are in existence, and who has been operating them. The following checklist is not a comprehensive approach, but it is a good example of how you might structure your audit.

You can audit the current status of digital marketing activities by analyzing the following factors:

- **Site audit:** Address your existing website or current performance. This requires an analysis of the site analytics on a basic level.

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- **Social and channel audit:** Identify existing social media and other channels are being used, their function, and performance.
- **Access and login details:** Ensure you have all usernames and passwords for all channels and analytics.
- **Administrators:** Note who the admins of your various channels are and how email updates are received.
- **Existing resources:** Note who is currently working on your owned channels and how many hours are being dedicated to daily operations.
- **History:** Check what history has been stored on activity management, previous campaign activity and what has previously been implemented.
- **Chain of command:** Understand who is working on digital activity, what remit each individual has and most importantly who is in command and responsible for decision making.

Let's dive into these in more detail.

Site audit

You need to address your existing website and its current performance. This requires an analysis of your site analytics, but at a more basic level. So, whether you're using Google Analytics or another provider, what you'll be doing is you'll be looking at how many visits you get per month, and how often they're coming, what times they're coming at, just to start to build a better picture.

Social and channel audit

This is identifying all the existing social media channels, and their function and their performance.

Access and log in details

It may sound strange, but it is a source of incredible frustration for a lot of marketing teams. When someone has set up a Twitter account, the email address that's linked to it is their personal email address. They've created the password, and all of a sudden they've left the organization, and then you don't have access to those channels anymore. So, make sure that for every channel, you have the login details, and you know what email it's being sent to, making sure that it's not a personal email address. If you need to, try to create business-owned email addresses, so that you can transfer any of that information cross-team, and especially when people leave, because there's nothing worse than losing an account for a month because somebody has left the organization.

Administrators

For some account systems, they run off an administration system instead of login details. So, Facebook is like this, Google Analytics is like this, where you can identify people as administrators. Again, it's important to do this because oftentimes, what happens when you do this audit is, you realize that 10 people are still the administrators of the Facebook page and they no longer work at the company anymore. This is also a security concern as it would leave ex-employees with access to your accounts.

Existing resources

Note who's currently working on your own channels, and how many hours are being dedicated to certain daily operations. For example, who works on a website, who adds pages, how often do they add pages, and with your social channels, who's responding to the queries, how long are they

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spending daily? Because what you'll find is that you need to efficiently use everyone's time. You might learn that there's a resource dedicated to social that's only being half used that could be used for your website, or you discover someone who's working on the website could actually be used more functionally to create additional content for your social channels.

History

Obviously, with digital, we've quite a lot of data available to us. It's important to understand what historical data exists and how you can actually begin to learn from that. Additionally, it can mean asking people that have worked on the account, what works, what doesn't. This can help to understand how the tags are set up on your various pages, on your website, how is your YouTube channel configured, and how often do you post on your social channels? All of this is very important to starting to build a better picture.

Chain of command

For some people, this will be relevant, others it won't, depends on how senior or junior you are in your organization, or whether you're the owner. But, chain of command is crucial to understanding any of the activity that you're doing, who approves it, who agrees what each person is doing, and who's responsible at the end of the day. Effectively, where does the buck stop? If something goes wrong, who's the person everyone's going to look to. And it's important to know that, because if someone is pulling up content or saying things online without having agreed with one of their superiors, then that superior can hold it over them. Therefore, an agreed sign-off process is strongly recommended. This means that if something goes wrong, everybody knows who's accountable and what the process is.

When your digital audit is complete, you will have a good understanding of your digital capabilities based on past campaigns, employee/agency skillsets and resources available. When your audit is done you can draw on learning and understand the tools and strategies available to proceed with your digital marketing plan.

AUDIENCE RESEARCH

What is it?

Audience research involves developing specific insights into your target audience that guide your activities. Audience research is great for building key insights, as it allows you to identify the specific interests, channels and demographic identities of your target audience. This information allows you to build a clear picture of your customer, to understand their online movements, and to gain insights on where you might reach them and deliver on your goals.

Audience research tools

There are a number of audience research tools available, including:

- **Facebook Audience Insight Tool:** Details audience interests, locations, engagement rates, and demographics which can help refine your messaging and targeting on Facebook
- **Twitter Audience Insight Tool:** Similar to the Facebook Insights tool; marketers can discover audience characteristics within the Twittersphere, so you can more effectively engage with their conversations
- **Google Ads:** Details the interests and demographics of your remarketing audiences so you can see the characteristics of your visitors and customers

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- **Consumer Barometer:** A free tool on ThinkwithGoogle.com that allows you to measure patterns and gain insights from consumers in different locations and across many industries
- **Google Keyword Planner and Display Planner:** Provides search trends; the Display Planner details website visitor characteristics, allowing you to identify the types of sites your audience browse
- **Brandwatch and Pulsar:** Audience listening platforms that allow you to monitor brand mentions on social and around the web to understand who is talking about your brand or competitors

Audience personas

Writing audience personas can help you build your audience insight by seeing them as real people.

Consider this persona, for example. Trudy is 30 years old and lives in the city. She is an accountant. She lives in a rented apartment with her boyfriend. Trudy likes sports, mainly tennis. Facebook helps her keep up with the latest Tennis Open results. She has plenty of discretionary income, so she is a member of her local tennis club and tries to travel to Wimbledon each year if she can get tickets.

An audience persona is a clever tool for creating a story for your audience. Creating this persona allows you to easily put yourself in their shoes, and often you'll find you naturally begin to build on their story without specific data points.

Key insights for developing audience personas

Just based on starting to understand the ideal target audience. Make sure to give them an age, gender, interests, family, content choices, and quirks, among others. What can we discover about Trudy's persona?

- Motivations and interests
- Digital channel choices
- Content preferences
- Search behavior
- Device usage
- Age
- Gender
- Quirks

Prioritizing your audience

When your persona is complete you can prioritize audience types based on how easy they are to reach using digital channels, and the value of that audience to the business. As such, you can plot your personas on a reach value matrix to prioritize them.

Prioritizing your audience allows you to revise and allocate budget effectively as you can give more budget to high-value audiences that are easier to reach than lower-value audiences that are difficult to reach.

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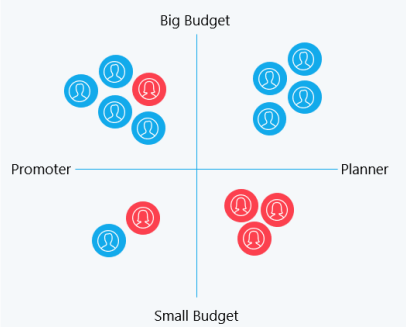

Furthermore, including channel preferences in your personas allow you to optimize your channel mix and media plan to target key personas on their preferred channels.

SOCIAL LISTENING

What does it involve?

Social listening involves observing or collating live social conversations to derive insight from the language and topics that are appearing in conversation. Indeed, social conversations offer insights into your consumer interests, aspirations, dreams, products, and more.

Although social listening is very effective, paid tools are required to maximize your insights. If you don't have access to paid tools, social listening can be achieved observationally when developing insights by searching keywords and making observational assumptions.

Observational and empirical social listening

Keep in mind that paid tools can go into incredible detail, looking at huge volumes of conversations. These large volumes allow you to make more accurate assumptions of insight into your audience.

If you do not have the budget to avail of a paid tool, you can achieve social listening outputs through observational social listening. It will not be as accurate as the tools you pay for. However, by observing how people use keywords, hashtags, and tags, you can develop hypotheses of behavior.

Observational

Review your social channels, customer emails, and phone conversations, and set up Google Alerts for brand mentions to observe how your audience is talking about specific topics. Gather a list of common keywords and phrases to understand patterns in how they talk about you. From there you can discover more about their sentiment and attitude to your brand. Are they happy or unhappy? Do they use specific emojis?

Empirical

Now that you have made some assumptions and uncovered insights, it's important to match this to hard numbers to verify your hypothesis. If your consumers are happy about a product, you should see high engagement on that product's content. If this is the case, you can draw a link between the frequency of certain common phrases about your brand with results from sales and conversions. You can begin to test using these keywords in your content and marketing assets to see if they have a further positive effect on performance. This way you have researched the audience and integrated insights about how they like to talk about your brand into your activity to drive better results.

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Developing insights

Here are five simple steps you can use to conduct your own social listening study:

1. **Identify keywords:** Identify commonly used keywords when discussing your brand, product, or service.
2. **Utilize social search:** Search on social platforms to confirm these keywords are used by the consumer.
3. **Check for additional keywords:** Check for additional keywords the customer is using that you have not considered
4. **Identify trends:** Identify trends in subject, language, or hashtags.
5. **Establish insight:** Gain insight from the customer's challenges or experience with competitors, for example.

As in the previous method, when you have gathered your insights about these customer traits you should then verify, for example, if a higher frequency of certain words and actions drives higher conversions. If so, it's worth testing how they can be included in your content and ads.

COMPETITOR RESEARCH

What is it?

Competitor research is a process of establishing a clear picture of your competitive landscape by identifying each of your competitors, the quality and size of their digital media channels, and applying your own interpretation of their strategies. It is a process of understanding your place amongst your competitors. This can help identify gaps and opportunities to capitalize on.

Ask yourself about the size of their digital footprint: how aggressively are they investing? What do you interpret to be their strategy? What do their content choices tell you about their goals? Is there even a strategy?

Competitor research can be done using social listening and desk research, including searches for competitor brands appearing in the news.

Key benefits

The following are some key benefits of competitor research:

- You can compare the **size of channels**.
- You can identify the **mobile ability** of their site.
- You can **compare channels**. What social networks are being utilized?
- You can **identify channel gaps**. Are there channels that are not being used, and is there an opportunity?
- You can **assess content**. Is your competitor's content good, and what need is it addressing?
- You can **assess format gaps**. Are there specific formats on specific channels that are not being utilized?

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DEVELOPING A BRIEF

What is it?

A brief allows you to identify the most important insights and understandings that will inform your strategy. Writing a brief is important because it is essentially a series of instructions for strategy development across media and creative.

- The **creative brief** is a document that uses product, audience, and competitor insights to inspire campaign ideas to deliver on your objectives. The outputs of the brief should be clearly defined, including, copy and messaging, creative formats, banners, social posts, and videos.
- The **media brief** is a document that uses audience data, motivations, and demographics. media budget, timings, content and creative formats to inform media choices to execute the strategy. The output of the brief should be a channel plan which detail all channels, paid and free, and go live and run rates for each of the channels.
- The **media plan** is another essential output which will detail all the paid media channels including cost line items for each. You can find an example of a brief template within the Resources tab of this module.

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LESSON 4: DEVELOPING A CREATIVE STRATEGY

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CREATIVE STRATEGY

Concepts

The creative strategy is one of the most important elements because it is the most visual element that will dictate the overall feel and look of your brand.

This is the documentation and understanding of your objective in relation to your audience and brand. Ideally, you are trying to develop a strategy that engages with your audience in such a way to deliver on your business objectives in the context of your brand values.

Now it's time to take your strategy and build creative messages and ideas that you will communicate through digital. A creative strategy is the long-term approach of how you develop visual stimuli for your brand, product, or service. It dictates the theme, look and feel of all of your assets. The creative strategy should again adhere to the overarching strategy. Doing this ensures that all work is following a specific guide, targeting a specific response, and cultivating repeat and specific behavior.

Remember, you must consider the budget when developing a creative strategy. It is important not to limit your initial thinking, but at the same time, at some stage, you need to draw the line and be realistic about your possibilities.

Key areas

The key areas to identify in creative strategy are:

- **Ideas:** What content will you make, what will it say, how are you different?
- **Activations:** What will you do that will encourage the consumer to respond, engage and converse?
- **Visual:** What will everything look like, is there a visual theme or guideline?
- **Narrative:** Refer back to the content strategy – what is the story we are trying to tell?

Managing expectations is unfortunately part of the job of any digital marketing manager. There is a myth out there that digital marketing is free. Highly creative, highly technical executions require investment. It is important that you temper your team's ambitions slightly.

The next step for your team is to compile a full format list for your content plan. This should be added to your content plan and include not only the creative requirement of each format, but the dimensions and specifications as well.

Creative strategies can become quite complex and with more technicality comes more resource requirement and also time. If digital is quite new to you then it's recommended you keep things simple at first with a view to building up to more technical pieces.

Formats

Remember to identify what formats are possibly not worth the effort if they will require more resources. Don't forget, if you're investing in a big piece of work, you should be matching that in paid media to deliver it through paid channels. Things do not go viral on their own; rich media display is costly to make, but equally expensive to deliver. It is important to consider drafting a budget for paid media on a particular piece of creative which is commensurate to the cost of developing the creative.

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Formats all require different dimensions. Becoming familiar with the formats can be a challenge. The best thing to do is to become familiar with the platforms and the formats they offer as you require them. There are thousands of formats. In display, they are delivered in the sizes of pixels, e.g. MPU 300 x 250 pixels.

When assessing your creative you should consider if it fits your brand values, uses the language of your audience (so it can be understood) and aims to deliver on your overall objectives.

Transferable content

The biggest challenge in the asset development stage is maximizing the efficiency and effectiveness of your assets. Essentially, how you can 'sweat' your assets:

You can begin by creating assets that can easily be converted to suit other social platforms. Develop creative that is platform agnostic and then tailor it to specific platforms. For example:

- **Shoot high-quality video:** Shoot video in the largest quality and consider video being effective as a vertical or horizontal video. During production, you should consider readability and video resolution across devices to ensure you can engage your audience on a mobile or desktop.
- **Capture GIFs:** GIFs can be captured out of video creative to be used in other campaigns or to complement existing ones.
- **Convert assets:** Convert existing creative assets into dynamic assets if appropriate. Examples of this would be on Facebook canvas where advertisers can create a rich mobile experience to target their audience on Facebook and Instagram mobile apps.
- **Use existing assets:** Take existing visual assets, like TV ads, and editing them to suit digital formats and channels.
- **Aid SEO:** Identify and use anything that you built as more content for your site to aid SEO. These assets include things like infographics which can be distributed on social or email and drive links for SEO off-site link building.

CONTENT STRATEGY

What is it?

A content strategy is a guide to how you create content, what content is written, and what formats are selected that drive toward your success outcomes. The content strategy should be based on of the overarching strategy.

The number one priority for your content strategy is to produce content that is consistently effective and builds the same behaviors with consistent audiences. From your overarching strategy, you can define how it will guide your content strategy. Essentially, where necessary, rewrite your content strategy to work toward the same goals outlined by your overarching strategy.

Essentially, a content strategy:

- Is based on your overarching strategy
- Explains your brand or campaign story and narrative
- States the main purpose of content, in relation to delivering on your objectives
- Details key content elements, such as format, tone, and messaging
- Ensures content is developed for purpose and effect

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An example of this would be if part of your strategy involves communicating with customers in unique and different ways that change perceptions of the brand. Your content strategy, therefore, would comprise delivering exciting content to your social audience in ways never seen before.

Content planning

Planning is a key activity for all elements of strategy. This is no different with content. Content planning involves addressing all details of your content strategy that will help plan content, from targets to implementation.

You need to address questions such as:

- What platforms will you operate on?
- How often will you post, tweet, or snap?
- What is your tone and personality?
- What is your core narrative, and what stories are you telling?

From this, you create a platform-specific plan that details actual posts.

The key attribute of a content strategy is designing effective content, and consistency is crucial for content. Brands often bounce from one story or narrative to another, which reduces engagement and recall – the audience simply finds it difficult to piece together all the inconsistent content they're exposed to. Remember, a consistent story creates a consistent audience response; and a consistent response builds behavior and positive perception of your brand with your audience.

The role of narrative

A narrative or story is the cornerstone of your strategy; it is what you use to build engagement and affinity with your audience. Regardless of your overall objective, your content strategy should have a narrative that tells a story – and that story must work to help you achieve your overall objective.

Format plan

A format plan is a list of all the formats that you will be implementing. It is necessary to ensure your creative formats are being developed to the required specifications. Developing a format plan allows you to completely understand the number of varying formats you will require. This is important as you move into the creative development phase.

Creating a format plan involves listing out all the various formats you will aim to use and the various specifications that are required – for example, video, canvas, link, and embed ads. Content on your site should utilize dynamic content and text that is relevant to you brand. This will help build your SEO approach.

You can start by:

- Laying out all content in a given time period
- Listing all relevant channels
- Detailing all copy
- Listing format details
- Understanding dimensions and requirements

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Listing out all your channels, formats, and dimensions is a task that will reveal where you can be more efficient. It acts as a quick reference guide and checklist for your designers or content creators to ensure all content pieces are being delivered. It also allows you to quickly sense-check formats against KPIs. For example, if 'clicks to site' is your objective, formats like 'photo image' will draw wasted clicks opening the image instead of clicking to the site. Link embed would be much more effective. If hashtag usage is a goal for your campaign, consider using 'conversational ads ', and using one hashtag in the copy.

At a later stage, you will need to determine how many channels you wish to support.

CHANNEL SPECIFICATIONS FOR A LAUNCH PLAN

Channel format requirements

Each channel will require specific format requirements. There are lead formats which are the most commonly used formats and are very effective. You should understand what formats you will implement as a part of your activity:

- **Video:** VOD, Social, Pre-Roll
- **Display:** Image, copy and dynamic
- **PPC:** Texts ads, sitelinks, phone, and other ad extensions
- **Facebook:** Video, Canvas
- **LinkedIn:** Display Formats, Posts, InMail
- **Twitter:** Video, Cards, Lead Generation
- **Instagram:** Carousel, Video
- **Snapchat:** Real-time asset creation

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LESSON 5: EXECUTING A DIGITAL MARKETING STRATEGY

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IDENTIFYING CHANNELS FOR YOUR CAMPAIGN

Channel strengths and weaknesses

Each channel has its own strengths and weaknesses, benefits and costs, freedoms, and limits, and should be scrutinized carefully to understand how it will or won't improve your campaign strategy. When you begin with your objectives and choose the optimal channel mix, you should identify the creative formats required and make sense of the value of production for these assets in relation to media costs. This is a good way to understand what media choices you need to produce for the best outcome.

Social

Choose social channels that are used by your customers and use paid social to drive reach and frequency of your ads and content to raise awareness and drive customer engagement and retention. Social can drive some direct conversions but social tends to have more of an assisting role in driving sales though it can sometimes directly drive sales of low-cost products. In most cases, awareness and engagement metrics are best suited to measuring the success of paid social with assisted conversions showing how it impacts on conversions and sales.

Display

Display placements on websites that are used by your target audience or target, retarget specific audience groups on multiple websites to drive awareness of your product or service. The success of display is best understood in terms of how effectively you can reach your target audience and serve your ads enough times that audience recall of your offering increases. Reach and frequency metrics are best suited to measuring the success of display campaigns while assisted, post-click or post-impression, conversions can illustrate display's impact on sales.

Paid search

Paid search, or PPC, keywords that are used by your target audience to buy products. Organize your keywords into ad groups and campaigns with compelling copy and ad extensions to encourage clicks from searchers who are actively interested in your product or brand. Google is the most widely used search engine but adding Bing or Yahoo along with any other search engines to your plan can open up your search activity to different types of searchers and drive incremental opportunities. Total sales, leads, cost per sale, conversion rate and other conversion metrics are best suited to measure success for PPC.

SEO

Choose to optimize the non-paid aspect of your search activity by ensuring the technical features of your website are working efficiently, particularly, in terms of load speed, mobile friendliness and limited or no broken links. Ensure the content you create contains frequent but natural use of search terms and phrases that your target searcher might use. Quality and well distributed content will accrue links from websites. Link building from quality websites will increase the visibility and rank for your website over time. Organic search drives most clicks on desktop devices and is considered more trustworthy than paid search by many searchers. PPC will drive more clicks on a mobile device, as it takes a few scrolls to get past the PPC results to the organic results below them. PPC and SEO, ideally, work together to try to capture as many searches as possible. Metrics used to measure the

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success of the SEO activities include conversion metrics, total sales, leads, conversion rate, and when assessing blog engagement, use metrics like repeat visits, average time on site, traffic levels to understand the value of SEO.

Email

Choose the email channel to drive retention of customers by engaging your mailing list. Those on your mailing list are ideally engaged with your brand, that's why they signed up. Distribute content to engage, special offers to entice and build customer loyalty over time. Use marketing automation to automatically email content to different persona types which you have defined at key times – as such, they will be best received and consumed by the audience. Be mindful of GDPR compliance when undertaking an email program. It is important to realize your retention objectives with email and measure success by looking at open rates, email click rates, mailing list growth, repeat visits, and higher lifetime customer value of mailing list subscribers versus site average. Email can directly drive conversions and, depending on the type of email program, this metric can be used to measure success, but for the most part, email drives retention.

Content

Finally, content marketing types can resonate with your audience and be distributed on the most appropriate channels to deliver on your objectives. Content marketing will feature in all aspects of digital marketing from videos to blogs, copy and whitepapers. Repeat engagement of content will have a positive effect on customer engagement and retention. It can drive awareness and assist in conversion activity. Content can be measured in terms of how it impacts the channel on which it is distributed, for example, engagement rates on social media, conversion rates is SEO and so on.

A MEDIA PLAN

The role of media plan

A media plan serves as a guide plan to how you will spend your ad budget, but it also serves as a way to track spends. At the end of each month, you should be reconciling your plan, which involves putting actual spends in the columns moving budget either forward or, if you've overspent, moving it back. Media plans are usually tables in Excel with each channel written on its own row as a line item. The channel name, for example. Facebook is written on the left and the audience targeting, objective, ad delivery, cost and run dates are written on the right of the table.

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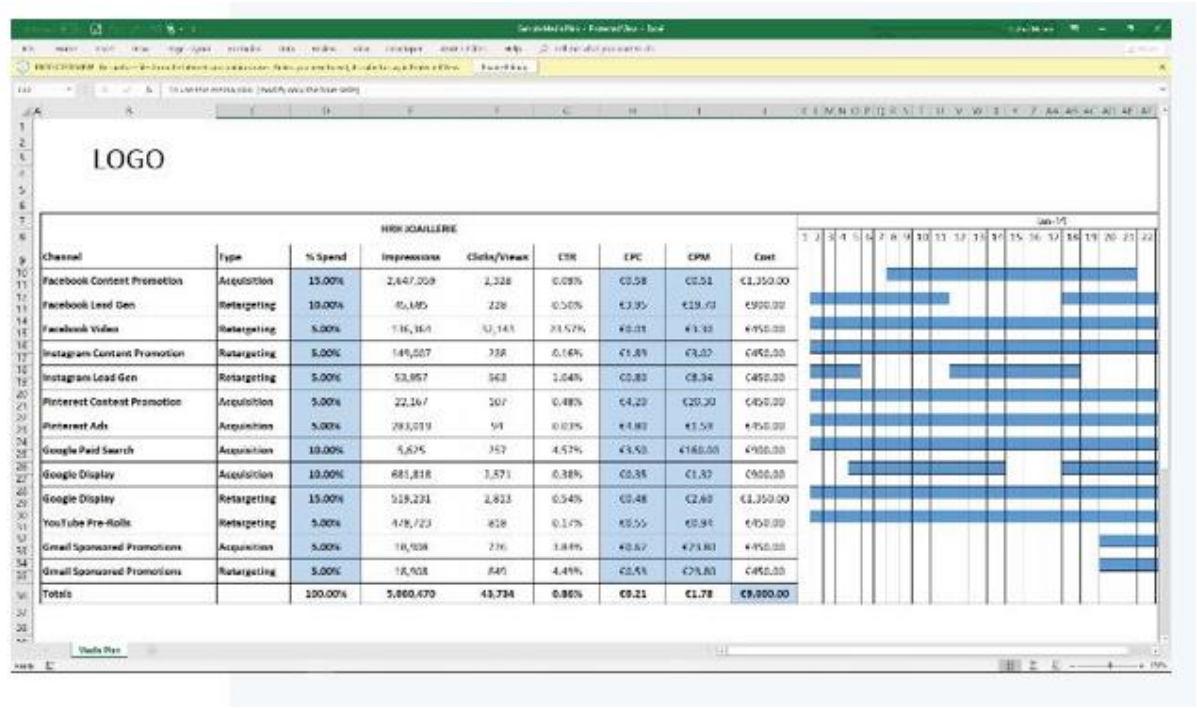

The benefit of detailing each platform line by line is that now you can determine how much content you have against how much support they will each receive. When campaigns are being set up, this is important because you'll know exactly what you're going to be doing throughout the whole campaign. And if you have an idea for a piece of content that's adding to this, then you'll need to actually find budget first.

The plan will also contain estimates of impressions and clicks which should be delivered for the budget. Digital marketers can work out ad delivery, impressions and clicks, by agreeing a CPM in advance for premium display. By dividing the budget by historical CPMs for GDN and social channels and historical CPCs for paid search, digital marketers can estimate what the budget could deliver in terms of click traffic and impressions.

Sometimes including the historical conversion rate for the channels could help forecast conversions from the campaign. Simply multiply the forecasted clicks for that channel by the conversion rate for the channel to broadly estimate conversions for your activity.

Once executed by the different in-house or agency stakeholders, such as PPC specialists, social media specialists, display and video specialists, checking-in daily becomes part of the routine to see if the plan is working or if changes are required to rectify errors or capitalize on opportunities.

EXECUTING YOUR STRATEGY

Campaign action plans

Campaign action plans are similar to media plans, but they cover all aspects of the campaign. They are the project plan for all the moving parts in a digital strategy, and will detail:

- Paid media channels (They tend not to include ad delivery or finer details of the paid media piece though)
- Non-paid channels
- Briefing deadlines for creative

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- Run dates for channels and timings for production
- Budgets per line item

Ultimately, they are a project management document to outline the budgets, channels, production, and timings of all elements in the campaign execution.

Like a media plan, they are formatted visually – like a calendar or Gantt chart – to make them easier to understand.

Digital adds value to other media

For larger campaigns with an offline element, we can look to integrate digital media to amplify and enhance performance across other channels – for example, TV. TV is definitely one of the strongest mediums which digital can support. Many viewers sit down in front of the TV while using social sites on their mobile device. This 'dual screening' presents an opportunity to enhance performance.

In this instance, there are two key tactics that can be implemented:

Trans-Time Mapping

When you buy a TV commercial, you are given very specific times and channels for when it will be shown – these are called trans-times. If you ensure TV audiences are targeted with both your creative and search activity to support the TV commercial during those times, two things can occur. Users are more likely to click on social content or search for your product, and there is higher recall of your TV creative.

When you map your TV trans-times to website traffic changes or social engagement, we can see the impact of the TV commercial on changing online behavior in your audience. Tracking the difference between normal levels and the traffic spike after a TV commercial airs helps measure the impact your TV slot.

Hashtag Integration

If your TV commercial has social planned at the center of it – in the sense that you hope to create some conversation about it – then a hashtag would be highly effective. If your hashtag is clearly listed at the end of the TV commercial it will give audiences the correct hashtag to participate in your conversation. This also applies to radio, print, and outdoor advertising.

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LESSON 6: COMMUNICATING A DIGITAL MARKETING STRATEGY

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COMMUNICATING YOUR RESULTS

Choosing how you communicate results

The final output of a digital marketing strategy is a single document that presents your objectives and how they will be achieved.

At this point you have:

- Identified the high-impact goals you want to achieve
- Set your KPIs and budgets
- Researched the audience
- Agreed a creative strategy
- Chosen your paid and organic channel mix

Now you need to collate this in a single document for approval by key stakeholders and execution by in-house or agency partners. It's incredibly efficient and valuable to have all the thinking and project pieces in one document for easy reference, sense-checking, and execution.

There are numerous ways to gather and present your digital marketing strategy together and this can vary depending on the audience.

Presentation

For example, if you want to secure budget or get approval, doing a presentation on objectives, outcomes, creative, channels, media plans and costs and presenting your strategy in PowerPoint is standard practice. However, it's not common to include complicated or technical elements of your strategy in a PowerPoint as these are executional pieces which should be shared with the appropriate teams, as the detail can confuse higher level stakeholders. In this instance, mention that there is an executional document to supplement the appropriate pieces within your strategy.

PowerPoint is best suited to communicate the top-level outcomes, actions, and costs of the strategy. It's stylish and, when delivered in person, can be effective in building trust with stakeholders and getting their feedback before it is signed off and executed.

Document

Microsoft Word and detailed documentation is best suited to technical pieces for execution. This document can be referenced as a supporting document to the PowerPoint to demonstrate that the finer details have been considered and are available if requested by stakeholders, but are intended for development teams, media planners and other executional departments. It's good to reference the existence of a technical document to build trust in the strategy without going through the actual details.

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REFLECTING AND ITERATING

Structure your strategy

At this point we have covered all the elements of a strategy and why they are important. We now need to pull it all together into a single document for input, changes, and sign-off by stakeholders. When writing your digital marketing strategy, it's best to begin in MS Word and detail everything before distilling it into a PowerPoint presentation. Remember to include a table of contents for easy reference. An example of a table of contents could be:

1. Introduction
2. Objectives
3. KPIs and Measurement
4. Research – Audience and Competitive Landscape
5. Creative Strategy and Sample Ads
6. Media – Paid and Organic
7. Costs
8. Project Plan and Timelines

When you have decided on the sections to include, and the most appropriate order in which to include them, reproduce the highlights in a PowerPoint presentation that you can send or present to internal stakeholders or clients.

Costs

Most agencies and marketers don't reveal the costs involved until the end, though this may differ depending on client or internal stakeholder relationships. Choose the best method and moment to reveal costs on a case-by-case basis. Revealing costs towards the end of the strategy presentation allows you to first show the plan in greater detail, and the reader can go through each item in the plan without the bias of the cost implications.

Once the strategy has been read and understood, putting a cost on its execution will allow the reader to understand the value of the strategy and allow them to decide how best to proceed. Built upon your research and skill as a digital marketer, this document is the summation of your groundwork to understand the core objectives and plan a successful outcome.

Bringing it all together

When undertaking a digital strategy, take time to complete the various research and planning stages. Draw on what you know about the business problem or objectives, consumer insights, channels, and KPIs to pull together all of the appropriate elements of digital marketing into one document – also summarized in PowerPoint – to deliver on a single or group of objectives.

Once signed off, you can refer to this document throughout the campaign to ensure all elements are being pushed live, on time, and performing as expected. It also provides a historical record of what

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was signed off by clients and stakeholders before the campaign began, which can be a useful record if people try to change the strategy from what was originally agreed. However, if there are changes, you can note any changes or modifications to the strategy as a result of live data and changes in expected performance. This can then be compared to the original strategy when the campaign is finished.

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LESSON 7: BECOMING A STRATEGIC THINKER

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UNDERSTANDING STRATEGIC THINKING

What is strategic thinking?

Strategic thinking is a process you can use to view, weigh up and create the future for yourself and others. It is an extremely effective and valuable skill. When used correctly, it can help you make good decisions related to work or to your personal life.

In order to understand strategic thinking, you first need to understand strategy. Now, there are many ways to define strategy, so let's settle on just one! Consider how you can bridge the gap between policy and tactics. What tactics can you use to implement the policy? This is your strategy. You can also think of strategy in terms of means and ends. You have an *end* in mind. What *means* can you use to reach that end? This again is the realm of strategy. We have resources available to us to get us to our end. Then how we deploy or arrange those resources is our *strategy*, and how we actually execute the actions are our *tactics*.

The classic 1987 *Harvard Business Review* article, "Crafting Strategy" by Henry Mintzberg, presents the idea of 'emergent strategy'. An emergent strategy is one that was not initially planned. Instead, it was formed through consistent actions that formed a pattern over time or through solving an unexpected issue that emerged. Rather than being planned for, it emerged naturally.

Strategic thinking in action

An in-house printing department printed a monthly sales list for the company's freight shipping agency. This was printed on the company's standard letter-headed paper. The company was successful, and its list of containers for hire was growing. This made it necessary to print on both sides of the paper. The headed paper was tearing in the printing machines when it was turned over.

The print department supervisor, using strategic thinking, proposed turning the sales list into a simple, folded page printed on plain paper with illustrations in one color on the front. The use of color in this context was unheard of. The trial run of the first leaflet produced a sensation in the London Baltic Exchange, multiplying the company's sales, as well as solving the printing problem. The result was, because of the publicity, the company won the largest container agency contract in the world at that time. Every other company was still printing its list on standard headed paper.

BENEFITS OF STRATEGIC THINKING

Now that you know what strategic thinking is, consider the benefits!

- With strategic thinking, you become **proactive** rather than reactive. You take the initiative and look actively for possible ways to improve. You don't just wait around hoping that something turns up, or that someone else will force you to change.
- Strategic thinking can also give you a **better sense of direction**. When you see, or indeed create, opportunity to achieve a change, this spurs you to move towards it.
- **Better operational efficiency** is another benefit. You begin to notice opportunities for better ways of organizing or doing work. Seizing them tends to lead to efficiencies and savings in time and resources.
- Did you know that strategic thinking can help to **increase market share and profitability**? This is because deliberately applying future thinking to building vision contributes directly to this.

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- You can make your **business more durable**. Each of the benefits already mentioned creates a foundation for durability.
- Efficient strategic thinkers tend to **notice windfall opportunities** and take advantage of them. When something fails, they don't throw their hands up in despair. No, they notice some new opportunity or idea that arises from the failure. They don't think in terms of solving problems. They think in terms of seeking solutions. This creates a more positive mindset.

Benefits in action

Intrinsically, strategic thinking feeds and enhances a company's vision to achieve its goals. Here's an example of how it can be applied to creating vision in the first place.

A group of radiography superintendents in a hospital specializing in the treatment of cancer had heavy workloads treating patients themselves. They reported being unable to find time to supervise their team members. Each of six superintendents reported treating ten patients per day on average. When asked how many patients each of their five or six team colleagues were treating each day, they did not have that information.

Someone suggested they give one of their own patients to each member of their team. This meant that they would have five or six fewer patients each day. And this, in turn, would leave them time to ensure their colleagues had their support and direct help at extra busy times. The new strategy increased productivity, and also improved working relationships and enabled better supervision.

CHARACTERISTICS OF STRATEGIC THINKING

Natural strategic thinkers tend to be big-picture oriented and direction-setters. These skills come naturally to some. And even if you don't already have these skills, they can be learned.

What are some of the main characteristics of strategic thinking? It is conceptual, systems-oriented, directed toward the future, and opportunistic in nature.

At its core, strategic thinking involves planning for the future. This means preparing strategies and conjuring ideas that will both cope with changing environments and consider the various challenges that lie ahead. This is strategic thinking in its forecasting or predictive form.

But there is another form of strategic thinking. A more powerful form of strategic thinking involves designing the desired future, and planning to make it happen. In other words, instead of just planning for the future, you aim to create the future!

Strategic thinking in action

A group of six outdoor education centers served the education system's inner-city schools in a major UK city. They were concerned that, with budget cuts, they were vulnerable to withdrawal of funds and to closure. In fact, three other centers had already been closed in the previous three years.

A Senior Education Officer persuaded them that, although they had always been competitors, the centers would be stronger if they joined forces, shared resources, and supported one another. This was a new strategy!

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One way to do this was to create a shared *vision* of how successful they could be. Guided through the visioning process, they developed the skills to think strategically about many of their systems, procedures, and operating plans.

FUTURE-BASING ®

Origins of Future-basing®

Rather than trying to predict the future, you can create it instead. One specific method you can use is called Future-basing®. It's a powerful process that involves four stages:

- Creating a vision
- Deciding clearly how to achieve it
- Building operational plans
- Generating a motivation to act

It encourages creative thinking and the sharing of ideas. This in turn builds a strong sense of common purpose between people who work on it together.

Future-basing® was learned by a commercial team in a military aircraft manufacturing and servicing organization. It was part of a project team formation process, and they used this technique to design their vision for a successful signing of an order on time and within budget. Because they were skilled at project management, they quickly recognized how they could develop their strategy, including the steps they could take and the deployment of their resources. The visioning process itself helped them to create a genuine sense of common purpose. The contract was signed in time and within budget!

Future-basing® can be used to develop and focus team objectives, create new systems and procedures, and resolve conflicts by thinking beyond them. It can help you build an organization-wide vision and cascade it through and across the business. And then you can design, plan, and evaluate projects in order to make that vision a reality.

Applying Future-basing®

Step 1: Stimulate imagination by 'reviewing the future'

In other words, you actually base yourself in the future when building your vision. A good way to do this is to describe your future vision as if it is already real. The first step is to fix a date and time as the basis for your vision, no matter how far ahead your goals lie.

Step 2: Create a frame for success

Think about what you are successful at. A helpful tip here is to generate a series of short headings describing important success areas, based on how your team or organization analyzes its operating environment. This enables you to focus attention on streams of achievement. Since you will naturally choose success areas that are important to you and the organization, your values are automatically built-in.

Step 3: Develop the vision

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Under each success heading, list specific achievements. These are things that have been achieved in the imagined future. Phrase the achievements in the present tense and use positive terms. In groups, members are invited to write their own desired achievements, and to personalize their descriptions with 'we', 'us', 'my', 'our', and so on.

Step 4: Analyze your feelings

Did you realize that strategic thinking involves more than just the logical part of the brain? You need to pay attention to your feelings too. So the fourth step is to note the evidence from your feelings. Now your achievements have been realized in this ideal future, how good does it feel? Are you pleased, amazed, excited, happy, relaxed, or energized?

Step 5: Map out how you got to this ideal future

Now that you know where you want to reach, the fifth step is to map out how we got to this ideal future. Remaining in the imaginary future, people 'remember' that, for each achievement to be true, there must have been at least one critical action or event which led them to here. Indeed, there may have been more than one event. As they are 'remembered', these actions or events are mapped out onto a progress chart to create a critical path plan or analysis.

Step 6: Generate buy-in

One way to achieve buy-in is to have in the room as many stakeholders as possible when the vision is being generated. You can also cascade Future-basing® across the organization. This can be done by creating the central vision, and then training people in various divisions or departments to create their own appropriate parts of the vision and action.

Finding metaphorical or symbolic ways to capture the vision and share it in story form is a way that leaders inspire their people to become involved and make things happen.

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